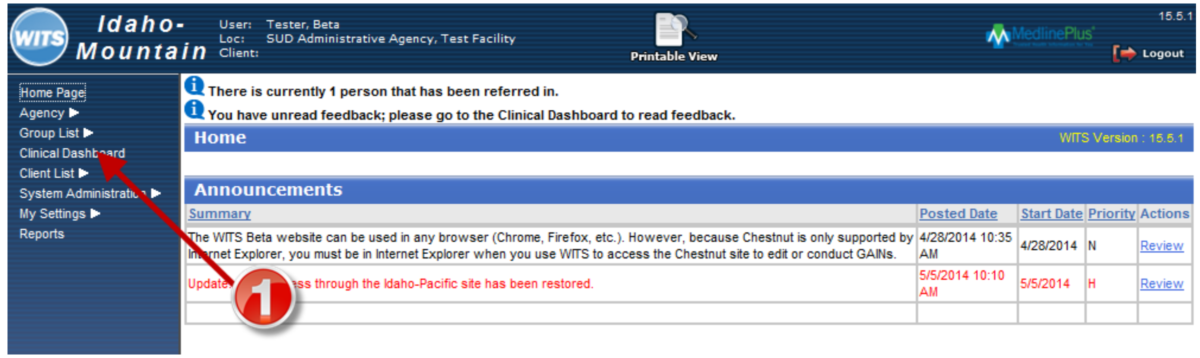
Clinical Dashboard for a Staff Member

Purpose

The Clinical Dashboard allows staff members to view their caseloads and to view Feedback from their clinical supervisor. All feedback is stored and tracked over time.

Locate the Clinical Dashboard

1. **Getting here:** The Clinical Dashboard is located on the navigation bar between the Group List and Client List.

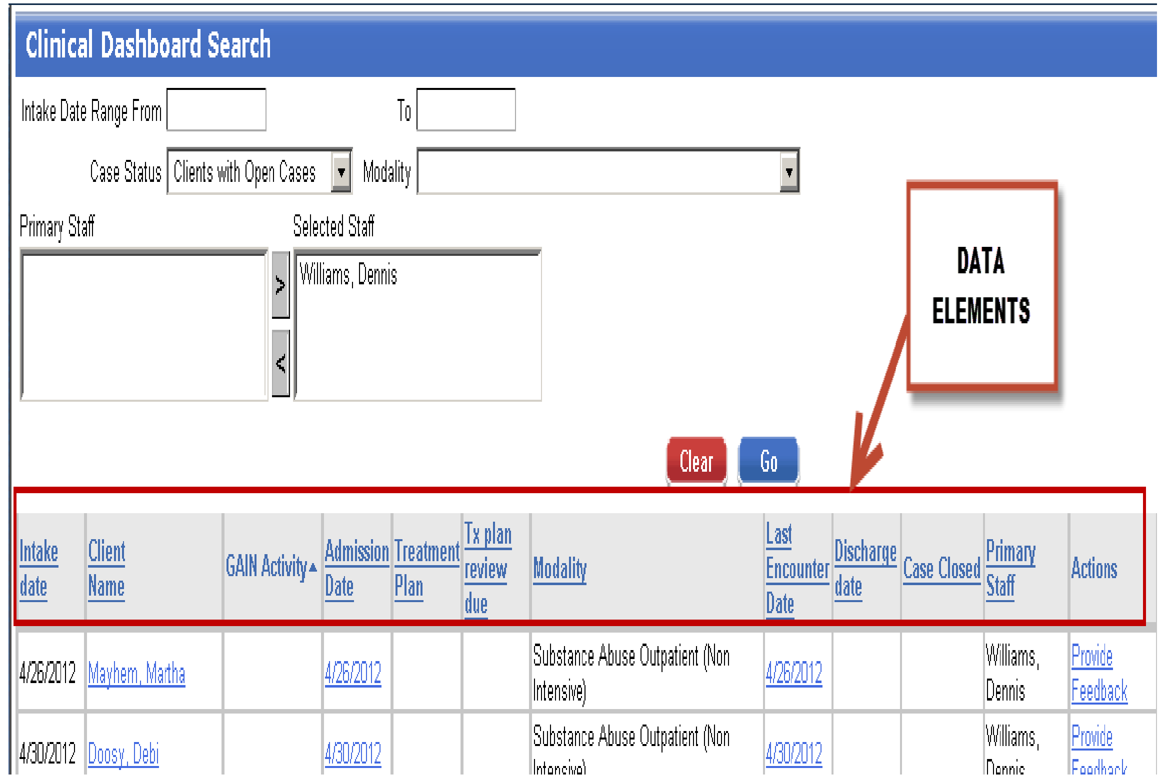


05/08/2014

Data Elements on the Clinical Dashboard

There are eleven (11) data elements for each episode of care:

- Intake Date: This is the intake date of the specified episode of care.
- Client Name: This is the clients name as it appears on the Client Profile.
- GAIN Activity: This reflects the date of the GRRS download into WITS in the specified episode of care.
- Admission Date: This is the Admission date for the specified episode of care.
- Treatment Plan: This reflects the last Treatment Plan Start Date where the Tx Plan Status is “Active-Signed Off” or “Active-Note Signed Off” in the specified episode of care.
- Tx plan review due: This reflects the most current Tx Plan Review Due date for the specified episode of care.
- Modality: This reflects the treatment Modalities associated to the Program Enrollments that the client is enrolled in the selected episode of care.
- Last Encounter Date: This reflects the Start Date of the last Encounter Note in the specified episode of care.
- Discharge date: This reflects the Discharge Date if a Discharge has been complete on the specified episode of care.
- Case Closed: This reflects the Case Closed Date if the episode of care is closed.
- Primary Staff: This reflects the staff that has been designated as the primary staff on the specified episode of care based on the hierarchy of Primary Staff Set-up.



Viewing an Individual Client Record & Reviewing Feedback

1. Narrow the records to review on the Clinical Dashboard by entering **Intake Date Range From** and **To** fields, **Case Status** and **Modality**.

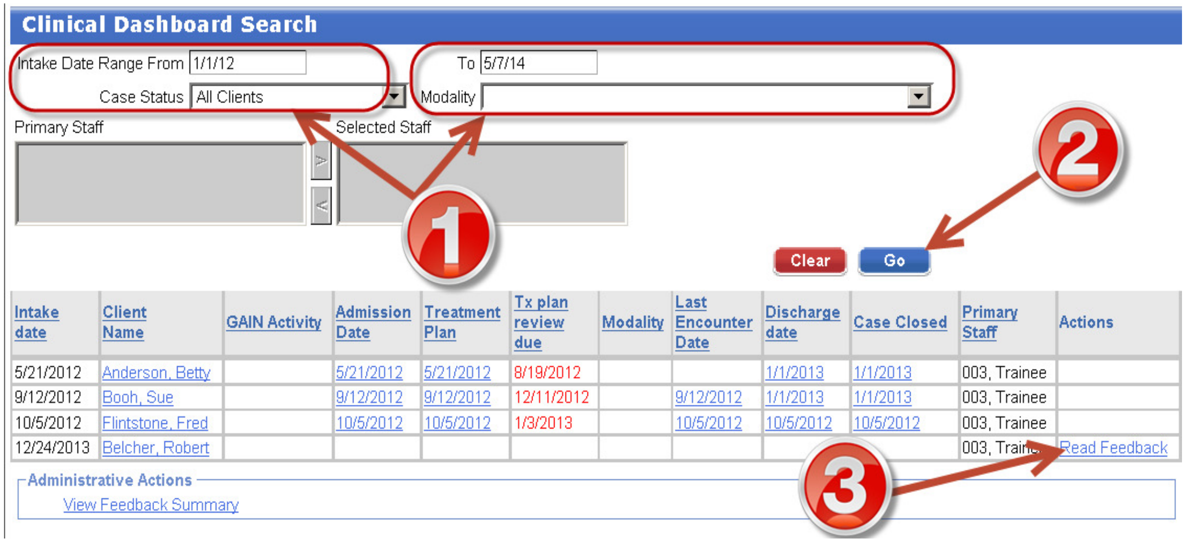
2. Click **Go**.

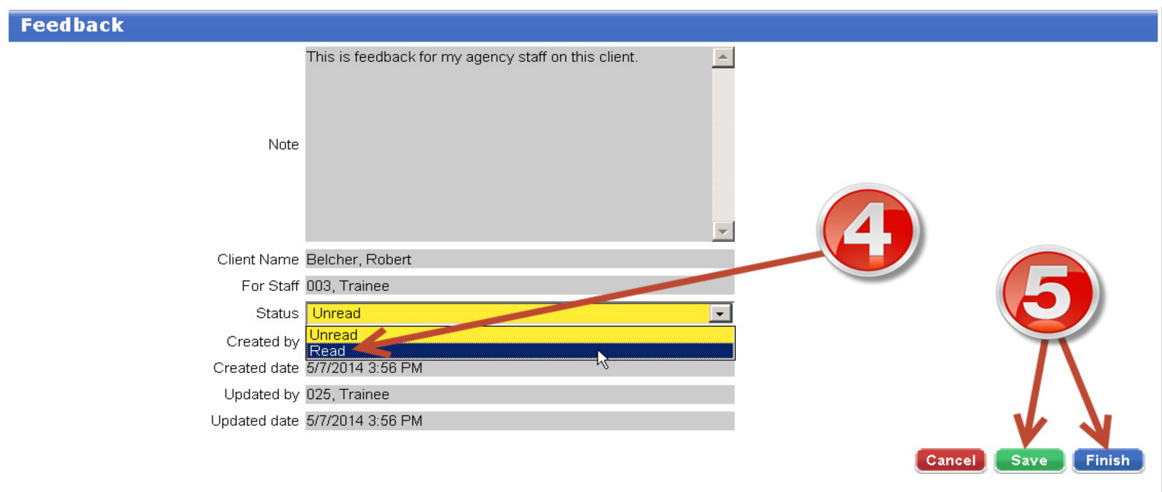
NOTE: **Client activities highlighted in blue serve as a link that can be used to quickly navigate to that specific activity. Client activities highlighted in red are past due. Client activities highlighted in yellow have unread Feedback.**

3. Click **Read Feedback** in the Actions column for the client record.

4. Change the Status field to **Read**.

5. Click **Save** and **Finish**.





Viewing the Feedback Summary Report

1. Click **View Feedback Summary** in the Administrative Actions box at the bottom of the Clinical Dashboard.

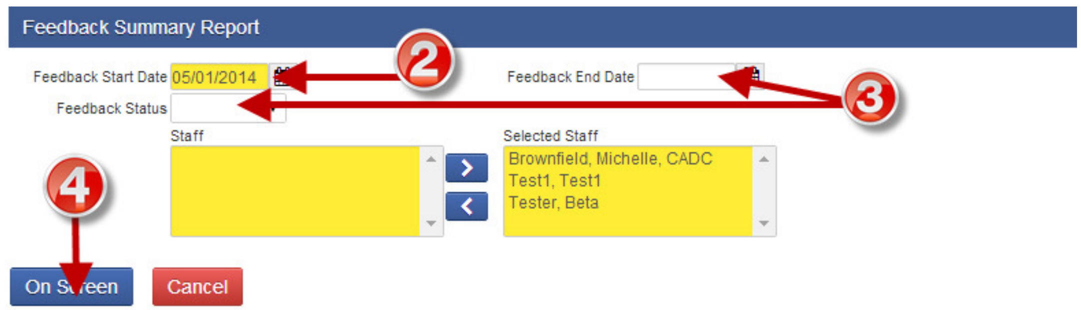
2. Enter the **Feedback Start Date**.

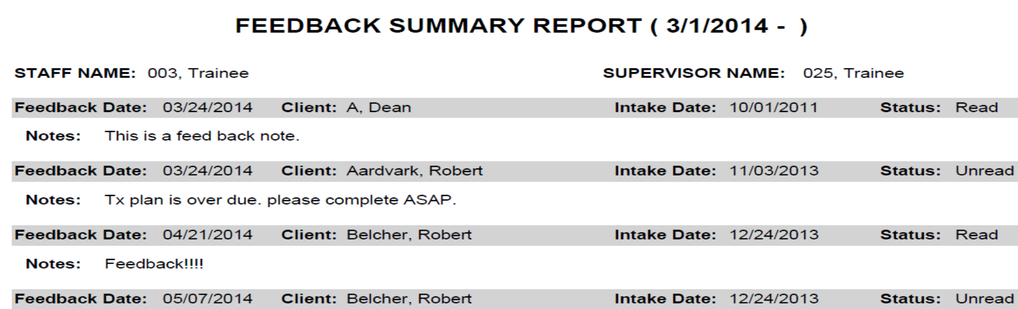
3. Enter the **Feedback End Date** and **Feedback Status** (these fields are optional).

4. Click **On Screen**.

NOTE: The Selected Staff defaults to the person logged into WITS.

NOTE: Hold the CTRL key on your keyboard down while clicking On Screen to bypass web browser security blocks. The Feedback Summary Report opens in a separate screen in PDF format.





FEEDBACK SUMMARY REPORT (3/1/2014 -)

STAFF NAME: 003, Trainee **SUPERVISOR NAME:** 025, Trainee

Feedback Date: 03/24/2014 **Client:** A, Dean **Intake Date:** 10/01/2011 **Status:** Read

Notes: This is a feed back note.

Feedback Date: 03/24/2014 **Client:** Aardvark, Robert **Intake Date:** 11/03/2013 **Status:** Unread

Notes: Tx plan is over due. please complete ASAP.

Feedback Date: 04/21/2014 **Client:** Belcher, Robert **Intake Date:** 12/24/2013 **Status:** Read

Notes: Feedback!!!!

Feedback Date: 05/07/2014 **Client:** Belcher, Robert **Intake Date:** 12/24/2013 **Status:** Unread